



CDC UNIFIED PROCESS PROCESS GUIDE



CONTRACT PROCUREMENT

Purpose of the Process Guide

CDC projects are required to comply with various CDC and Federal regulations, mandates, policies, processes, and standards. Information about these requirements is available from various websites and supporting documents. However, this information is often not presented from the perspective of the project team and their roles & responsibilities in complying with these requirements. CDC UP Process Guides provide that perspective.

CDC UP Process Guides help project teams comply with CDC and Federal requirements by:

1. Setting the requirements in the context of their purpose
2. Providing step-by-step instructions for completing the activities required for compliance
3. Illustrating potential integration points between processes
4. Presenting requirements in a concise, easy-to-understand, and consistent format
5. Making that presentation accessible to the CDC community via the CDC Unified Process website

The specific purpose of this Process Guide is to describe the **Contract Procurement** process as it applies to project teams.

Process Overview

The Contracts Procurement process is followed if the required supplies or services are expected to cost more than one hundred thousand dollars (\$100,000) and they are not available to order from an existing General Services Administration (GSA) or CDC contract, or if the acquisition will be complex, e.g., involving human subjects or requiring special clearances. If you are not able to determine whether your procurement requirement is complex, contact your Procurement and Grants Office (PGO) point of contact.

The project manager is not directly involved in the procurement of contracts. The Program/Project Officer submits the Request for Contract (RFC) and the Procurement Requisition (PR) to PGO for review and approval. Each NC appoints its own Project Officers. To determine your Project Officer, contact your immediate supervisor.

The amount of lead time required to complete the acquisition process is determined on a case-by-case basis. The lead times for the process are as follows:

- **Contract Modifications/Task Order Modifications**
 - Requires **30** days
- **New Task Orders**
 - Competitive/GSA requires **62** days
 - Single Source requires **30** days
- **RFPs/IFBs**
 - Requires **165** days
 - 5 days = Program Offices for Responding to Questions
 - 10 days = Program Preparation of Business Review Summary
 - 10 days = Program Review of Final Proposal Summary, Prep of Final Tech Evaluation Summary & Award Rec.
 - 14 days = Program Preparation of Tech Evaluation Summary

For more information regarding lead time required to complete the acquisition process please refer to the PGO website at: http://pgo.cdc.gov/pgo/webcache/SOP/KPI_Definitions_-_2006-11-20_Contracts.ppt

Prior to beginning the procurement process, CDC's Office of the Chief Operating Officer (OCOO) sends out a planning guidance memo to NCs reminding them of the forecasting activity for the next fiscal year's grant awards and acquisitions and specifying the due date for initial plan submission for the following



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year. Each NC, in conjunction with PGO and FMO, prepares an Acquisition and Assistance Forecast Plan containing all known and potentially new procurement needs. Each NC's Office of the Director meets with their divisions and PGO to discuss proposed projects and finalize the Acquisition Plan, which is then submitted to the Project Officer to begin the creation of the RFC package.

CDC's acquisition and assistance activities are handled by the PGO. PGO awards, administers, and terminates contracts, purchase orders, grants, and cooperative agreements.

This process guide focuses on PGO's procurement process for Contracts. For information about the process for Simplified Acquisitions, the streamlined acquisition methods used to procure services/supplies that cost less than one hundred thousand dollars (\$100,000.00), or the process for Task Orders, which are created for existing CDC contracts. Refer to the respective CDC UP Process Guide on Simplified Acquisitions and Task Orders located at <http://www.cdc.gov/cdcup/>. The process for Grants Procurement will be documented in a later version of the CDC UP.

Process Attributes

This section provides a list of process attributes to help project teams better understand the requirements necessary to comply with this process and to determine when and how they may impact their project.

PROCESS ATTRIBUTE	DESCRIPTION
Process Owner(s)	Procurement and Grants Office (PGO)
Process Criteria	For all projects procuring supplies/services costing more than one hundred thousand dollars (\$100,000) and not available to order from an existing GSA or CDC contract.
Timing of Process in Project Life Cycle	Begins in the Planning phase of the project lifecycle and continues until the contract is closed out.
Estimated Level of Effort	Depends on the size of the contract. Project Manager will need to initially spend 10-20 hours to develop the Statement of Work (SOW) and other materials for the RFC. During the processing of the procurement request there is not much involvement on the project team's part, except responding to any clarification required from the Project Officer or Contracting Officer.
Associated Costs	No cost to the project except the cost of the contract and the estimated level of effort described above.
Process Prerequisites	<ol style="list-style-type: none">1. The cost for procuring the services or supplies must be taken into account during the NC's budget formulation process.2. The procurement need must be included in the NC's Acquisition and Assistance Forecast Plan.3. Funding for the procurement should be approved prior to initiating the procurement request.4. If the project manager acts as the Project Officer then he or she must have completed Project Officers training as required by the Health and Human Services Acquisition Regulations (HHSAR).
Process Dependencies	A memorandum is issued annually by the Chief Operating Officer of CDC, describing the planning schedule and submission timelines for that fiscal year. Refer to the Acquisition/Assistance Planning Schedule below for timelines for FY2010
Related Systems/Tools	Integrated Contracts Expert (ICE). This tool is mainly used by Project Officers and PGO.



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PROCESS ATTRIBUTE	DESCRIPTION
	http://pgo.cdc.gov/pgo/GeneralContent.do?chronicleid=0900f3ee8000703c
Available Training	Training is available through CDC Corporate University for the following: <ul style="list-style-type: none">• Project Manager Training• HHS Project Officer Training Program• Acquisition Planning http://intranet.cdc.gov/ecp/training.asp
Additional Information	PGO Intranet: http://pgo.cdc.gov/pgo/ViewHome.do Contracts Standard Operating Procedure: http://pgo.cdc.gov/pgo/ViewCategory.do?AudienceID=2#1

Contact List

This section provides a list of individuals and/or offices that are available to assist project team in answering questions regarding the content of this Process Guide and related topics. Due to the ever-changing nature of our work environment, some of the information may be out of date but please refer to the PGO website for all contact information: <http://pgo.cdc.gov/pgo/ViewCategory.do?AudienceID=6>

Key Terms

The CDC Unified Process Team maintains a comprehensive list of key terms and acronyms relevant to all Unified Process artifacts maintained on the CDC UP website. Follow the link below for definitions and acronyms related to this, and other, document.

<http://www2.cdc.gov/cdcup/library/other/help.htm>

Activities Checklist

This section provides a list of steps outlining the activities associated with complying with this process. Due to the dynamic nature of the activities associated with complying with this process a website has been established to communicate the most current information regarding Contract Procurement requirements. This website also contains a list of the related templates that assist in completing Contract Procurement activities. <http://pgo.cdc.gov/pgo/ViewCategory.do?AudienceID=2#>